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**POINTS TO INCLUDE WHEN INSTRUCTING SUPERVISORS
IN THE USE OF THE PERSONNEL EVALUATION REPORT**

1. On 13 June 1952, General Smith approved the Final Report of the Career Service Committee, thereby inaugurating the CIA Career Service Program. The report was distributed under Agency Notice on 19 June. Be sure to read this report. 25X1
2. The Final Report of the Career Service Committee was the end-product of over a year of comprehensive investigation and intensive discussion by a number of committees appointed to formulate the various aspects of a career service program for the Agency.
3. The Personnel Evaluation Report form that you have before you was developed by one of these committees as an integral part of the CIA Career Service Program.
4. Each of us recognizes the importance of continual evaluation of performance as an essential element in a career service. The Personnel Evaluation Report that has been designed for use in this Agency incorporates the best thinking of modern personnel administration both in its specific objectives and in its relation to our career service program.
5. Each supervisor in the Agency has the special responsibility of explaining to the individuals working under his jurisdiction the essential elements of the CIA Career Service Program and the specific functions of the Personnel Evaluation Report.
6. Turning first to the Routing and Action Slip -

The upper box of the Routing and Action Slip will be filled in by the appropriate central Personnel Office and will be sent to the Evaluations Officer in your office.

Your Evaluations Officer will transfer the information in the first six items on the Routing Slip to the first six items of the Personnel Evaluation Report form before sending the P. E. R. to the supervisor concerned.

The lower part of the Routing Slip indicates the steps that will be taken in the processing of the Personnel Evaluation Report.
7. For the purposes of this evaluation program, a supervisor is anyone who supervises anyone else.
8. Now turn to the blue booklet, YOUR PERSONNEL EVALUATION REPORT, and to the form itself, PERSONNEL EVALUATION REPORT. We shall discuss them together.

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9. The first inside page indicates that this blue booklet is issued jointly by the Office of Training and the Personnel Office.

Policy for this program derives from the central Career Service Board, from the office Career Service Boards, and from the central Personnel Office.

The Office of Training is responsible only for getting out the information and for providing instruction to all offices in the Agency.

All questions regarding any phase of the Personnel Evaluation Program should be referred through channels to your Evaluations Officer. He will then secure the necessary information from the appropriate source. Since this is a new program, it is particularly important that all inquiries be sent through channels so that everyone concerned may have the benefit of the information as it comes through.

A copy of the blue booklet will be given to each individual in the Agency at the time that he fills in a Personnel Evaluation Report.

10. TOUCH BRIEFLY ON EACH PARAGRAPH OF THE BLUE BOOKLET AND PROVIDE AN OPPORTUNITY FOR ANY QUESTIONS AS YOU GO ALONG.

First page, second paragraph: "it is important that each individual in the organization become thoroughly familiar with Agency Notices 25X1
 Check with your Evaluations Officer if you need additional copies of these notices to insure that each person under your supervision reads these notices before filling in a P. E. R.

ELABORATE ON - "This evaluation is in terms of the requirements of your current position, etc." This is not a RATING form. This is not a substitute for the Civil Service efficiency ratings. This evaluation procedure is an aspect of the CIA Career Service Program. This evaluation is descriptive rather than rating or grading. This evaluation is designed to spot-light performance that is good and that is promising for the future development of the individual and of the Agency, and also to indicate where performance does not measure up to the requirements of the job. It is constructive and positive, but it is completely down-to-earth and realistic.

11. Last item in the list of Specific Uses: "To indicate suitability for re-employment . . ." This item is with the thought of some form of CIA Reserve in the future.

12. Now to a discussion of the items that follow the heading in the blue booklet, - Personnel Evaluation Report - Form No. 37-151.

EMPHASIZE THE IMPORTANCE OF FRANK DISCUSSION BETWEEN THE INDIVIDUAL AND THE SUPERVISOR BOTH BEFORE AND AFTER THE FORM IS FILLED IN.

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- 12.(cont'd) The key word for this entire program is UNDERSTANDING. This program of personnel evaluation can succeed only when there is understanding between each supervisor and each individual supervised regarding the requirements of the job, the individual's performance, and the objectives and procedures of this evaluation program.
13. Item 5. GIVE EXAMPLES OF HOW THE DUE DATE AND THE PERIOD COVERED BY THE REPORT ARE CALCULATED. Since this will be determined by a central Personnel Office, supervisors need to be prepared only to clarify the simpler questions that may be raised regarding Item 5. Difficult questions should be referred to the Evaluations Officer.

EMPHASIZE AGAIN THAT THE EVALUATIONS OFFICER IS THE CHANNEL FOR ALL INFORMATION ON THIS PROGRAM; INQUIRIES SHOULD BE REFERRED TO HIM.

14. Item 5 in the blue booklet. Turn the page. Second paragraph from the top of the page. EXPLAIN THAT AN INDIVIDUAL MUST HAVE BEEN UNDER THE JURISDICTION OF HIS CURRENT SUPERVISOR FOR NINETY DAYS BEFORE AN ANNUAL REPORT WILL BE FILED.

When this personnel evaluation program gets fully under way, a Personnel Evaluation Report will normally be filed each time there is a reassignment of an individual or of a supervisor.

Item 5. Third paragraph from the top of the page: Correction - Cross out: "exclusive of time spent in provisional status pending full security clearance." This paragraph will simply read: "After 1 October 1952, an Initial report will be prepared for each individual as of the date that he completes his first nine months of service in the Agency." That is, - after he has been on the pay-roll for nine months.

Item 5. Fourth paragraph from the top of the page: EXPLAIN THAT THERE WILL BE NO WAITING PERIOD OF NINETY DAYS IN THE CASE OF THE INITIAL REPORT.

15. Item 7 on the report form must be honest and realistic in terms of the individual's actual daily work. The success of this program depends upon a true statement of the individual's major duties. It is on the basis of the statement given in Item 7 that the individual will be evaluated in Item 11. There must be a meeting of the minds between supervisor and the person evaluated on the outline of major duties contained in Item 7.
16. It is certainly not the purpose of this evaluation program to get people stirred up or to make them restless. However, there are bound to be a number of people in jobs for which they do not consider themselves best qualified. Item 9 provides an opportunity for an individual to indicate the type of work for which he considers that he is better qualified than for the job he may be in at the time of filling in this P. E. R. It is hoped that most people will indicate that they are primarily interested in the type of work they are doing at the time the P. E. R. is due.

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17. Item 15. This item provides an opportunity for a supervisor to indicate work that may be better suited to an individual's abilities than the work that he is now doing. This may be because an individual's work is entirely satisfactory but that the work he is doing provides little opportunity for the full use of his abilities, or it may be because the individual's work is not satisfactory and it appears that he might do better elsewhere. Here, again, there must be a frank and realistic evaluation of the individual's performance and potentialities. If an individual being evaluated is, in the opinion of the supervisor, obviously unqualified for work in CIA, the supervisor should discuss this situation with officials above him and with the administrative office before making a recommendation for reassignment.

18. WITH REFERENCE TO ITEMS 7 AND 11, AND ITEMS 9 AND 15, EMPHASIZE THAT IT IS OF THE GREATEST IMPORTANCE THAT THERE HAVE BEEN FRANK DISCUSSIONS BETWEEN THE SUPERVISOR AND THE INDIVIDUAL EVALUATED BEFORE THESE ITEMS ARE FILLED IN. NEITHER THE SUPERVISOR NOR THE INDIVIDUAL EVALUATED SHOULD BE SURPRISED BY THE STATEMENTS THAT EACH GIVES UNDER THESE ITEMS. THERE MUST BE UNDERSTANDING IF THIS PROGRAM IS TO WORK EFFECTIVELY.

It is suggested that a policy of providing the fullest possible information regarding opportunities in CIA will, in the end, lead to the most constructively stable situation all round. Information regarding career opportunities in CIA should be secured through your office Career Service Board and through the Placement Officer serving your office from the central Personnel Office.

19. Item 18. The supervisor is required to discuss the report with the individual evaluated after the report has been reviewed by the reviewing official. A supervisor is not required to show the report form to the individual evaluated, but he may do so if he wishes to.

SUPERVISORS SHOULD BE ADVISED TO DEVELOP CONSISTENT POLICY WITH REFERENCE TO: TO SHOW OR NOT TO SHOW THE COMPLETED FORM TO THE INDIVIDUAL EVALUATED. Something to be discussed at staff meetings.

20. EMPHASIZE THE FINAL THREE LINES IN THE BLUE BOOKLET AS A TRUE STATEMENT OF THE CENTRAL OBJECTIVE OF THE PERSONNEL EVALUATION REPORT PROGRAM.

21. In conclusion -

Two factors that contribute most directly to good morale in any organization -

- a. To have confidence in the organization.
- b. To feel that one's abilities are being fully utilized.

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1 October 1952

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